



First Look – New 9902  
Housing Counseling Agency Activity Report  
January 30, 2014

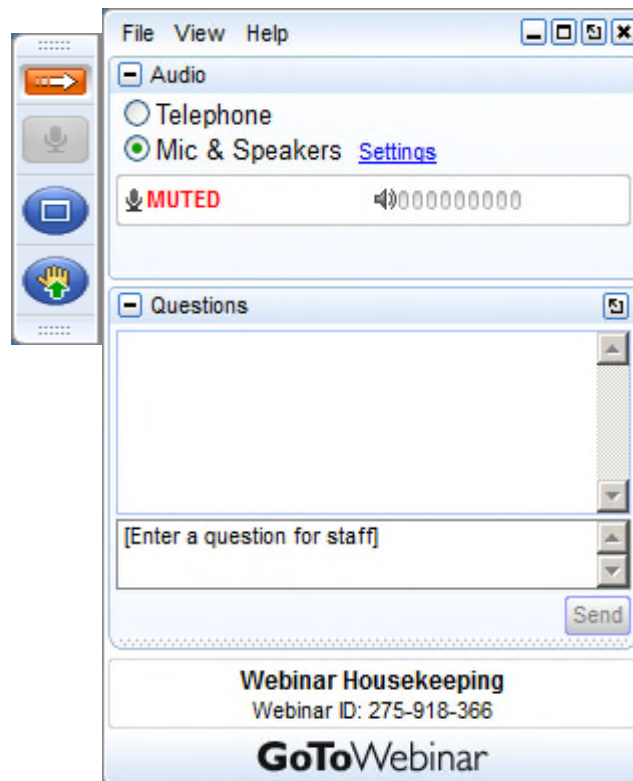
# GO TO MEETING

## Webinar Logistics:

- Conference Phone #:
  - Dial-in: [\(800\) 700-7784](tel:8007007784)
  - Access Code: [315782](tel:315782)
- Audio Recording
- Attendees muted during presentation
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# GO TO MEETING

## Webinar Logistics:



# Opening Remarks

Brian Siebenlist, Director

Office of Policy and Grant Management

Office of Housing Counseling

# Presenters

Beth Eilers

Anita Olson

Ben Detterman

Housing Program Specialists  
Office of Housing Counseling

# Agenda

- First Look at the new 9902
- Approved by Office of Management and Budget
- Implementation: October 1, 2014
- Review of Changes to Form HUD 9902

# New Housing Counseling Agency Activity Report – FORM HUD 9902

Why did HUD change the Form HUD 9902?

- Results of stakeholder feedback
- To develop more effective methods of capturing and recording housing counseling program effectiveness and impact
- User-friendly and realistic reporting tools that are more sensitive to stakeholder resources and capacity
- To eliminate ambiguity in the results being reported
- Dodd-Frank Act Compliance

# New Housing Counseling Agency Activity Report – FORM HUD 9902

What are the major changes with 9902?

- Elimination of all sub-categories of outcomes for each type of counseling
- The “Other” reporting option is no longer available for individual counseling
- Multiple positive outcomes available for the same households
- New Limited English Proficiency and Rural Area Status sections



# New Housing Counseling Agency Activity Report – FORM HUD 9902

What was the process for implementing the new 9902?

- Dialogue with stakeholders to obtain input
- Paperwork Reduction Act (PRA) process
- Client Management System vendor communication

# New Housing Counseling Agency Activity Report – FORM HUD 9902

Other housing counseling components need to be adjusted such as:

- HUD Housing Counseling System
- Client Management Systems
- Data Intake forms

# New Housing Counseling Agency Activity Report – FORM HUD 9902

## **Specific Changes to the form 9902**

- 3 Columns of Activity Data
- Addition of Rural Area Status Section
- Addition of Limited English Proficiency Status Section
- Addition of Homeless Prevention Workshop under Group Education Section
- Separation of Purpose for Visit and Results Section
- Creation of Impact and Scope of Counseling Service

# New Housing Counseling Agency Activity Report – FORM HUD 9902

New change – 3 columns instead of 2 columns

All Counseling and Education Activities	HUD Housing Counseling Program Grantees Only	
	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds – Actual, to date.	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds – Annual Projection

# New Housing Counseling Agency Activity Report – FORM HUD 9902

6. Rural Area Status				
a.	Household lives in a rural area			
b.	Household does not live in a rural area			
c.	Chose not to respond			
Section 6 Total:				

# New Housing Counseling Agency Activity Report – FORM HUD 9902

## 7. Limited English Proficiency Status

a.	Household is Limited English Proficient			
b.	Household is not Limited English Proficient			
c.	Chose not to respond			
Section 7 Total:				

# New Housing Counseling Agency Activity Report – FORM HUD 9902

8. Received Group Education				
a.	Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit			
b.	Completed predatory lending, loan scam or other fraud prevention workshop			
c.	Completed fair housing workshop			
d.	Completed homelessness prevention workshop			
e.	Completed rental workshop			
f.	Completed pre-purchase homebuyer education workshop			
g.	Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners			
h.	Completed resolving or preventing mortgage delinquency workshop			
i.	Completed other workshop			
Section 8 Total:				

# New Housing Counseling Agency Activity Report – FORM HUD 9902

9. Households Receiving One-on-One Counseling, by Purpose				
a.	Homeless Assistance			
b.	Rental Topics			
c.	Prepurchase/Homebuying			
d.	Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)			
e.	Reverse Mortgage			
f.	Resolving or Preventing Mortgage Delinquency or Default			
Section 9 Total:				
Households Served Sections 8 and 9 Total:				



# New Housing Counseling Agency Activity Report – FORM HUD 9902

10. Impact and Scope of One-on-One Counseling Services				
a.	Households that received one-on-one counseling that also received group education services.			
b.	Households that received information on fair housing, fair lending and/or accessibility rights.			
c.	Households for whom counselor developed a sustainable household budget through the provision of financial management and/or budget services.			
d.	Households that improved their financial capacity (e.g. increased discretionary income, decreased debt load, increased savings, increased credit score) after receiving Housing Counseling Services.			
e.	Households that gained access to resources to help them improve their housing situation (e.g. down payment assistance, rental assistance, utility assistance, etc.) after receiving Housing Counseling Services.			
f.	Households that gained access to non-housing resources (e.g. social service programs, legal services, public benefits such as Social Security or Medicaid, etc) after receiving Housing Counseling Services.			
g.	Homeless or potentially homeless households that obtained temporary or permanent housing after receiving Housing Counseling Services.			

# New Housing Counseling Agency Activity Report – FORM HUD 9902

10. Impact and Scope of One-on-One Counseling Services			
h.	Households that received rental counseling and avoided eviction after receiving Housing Counseling Services.		
i.	Households that received rental counseling and improved living conditions after receiving Housing Counseling Services.		
j.	Households that received prepurchase/homebuying counseling and purchased housing after receiving Housing Counseling Services.		
k.	Households that received reverse mortgage counseling and obtained a Home Equity Conversion Mortgage (HECM) after receiving Housing Counseling Services.		
l.	Households that received non-delinquency post-purchase counseling that were able to improve home conditions or home affordability after receiving Housing Counseling Services.		
m.	Households that prevented or resolved a mortgage default after receiving Housing Counseling Services.		

# New Housing Counseling Agency Activity Report – FORM HUD 9902

<b>11. HUD Housing Counseling Grant(s) Data</b>		
HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
<b>Section 11 Total:</b>		
<b>HUD Point of Contact:</b>		
<b>12. Authorization</b>		
<b>Input Official</b>		<b>Agency Official</b>
First Name:	First Name:	
Last Name:	Last Name:	
Title:	Title:	
Phone:	Phone:	

# Concluding Remarks

Brian Siebenlist, Director  
Office of Policy and Grant Management  
Office of Housing Counseling

# For More Information

**Office of Housing Counseling web page:**

[www.hud.gov/housingcounseling](http://www.hud.gov/housingcounseling)

**Email questions or comments with  
subject line “New HUD form 9902”:**

[housing.counseling@hud.gov](mailto:housing.counseling@hud.gov)